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ABSTRACT

This document is intended to help Oregon district-level curriculum planners, teachers, regional coordinators, and department of education staff plan programs to meet the entry-level needs of office support workers and to prepare students for a postsecondary learning experience. The instructional program is described in terms of goals, approval criteria, configuration options, course titles, course descriptions, and content standards. Content standards include those for basic skills, technical skills, and employment skills and attributes identified for a career as secretary, receptionist, typist-clerk, word processing operator, or data processing operator. The standards are based on occupational information taken from the Oregon Office Systems and Marketing Technical Committee Reports and the Lane County Office Systems Committee task list. The document also includes: information on the process of program approval, office systems vocational cluster approval criteria, a content standards course matrix, competency statements regarding basic and technical skills, definitions, and five references. A matrix that shows skills designated essential learning skills and where they occur in the curriculum, a work history record form that incorporates a competency profile, and a sample competency certificate are provided in the appendices. (CML)

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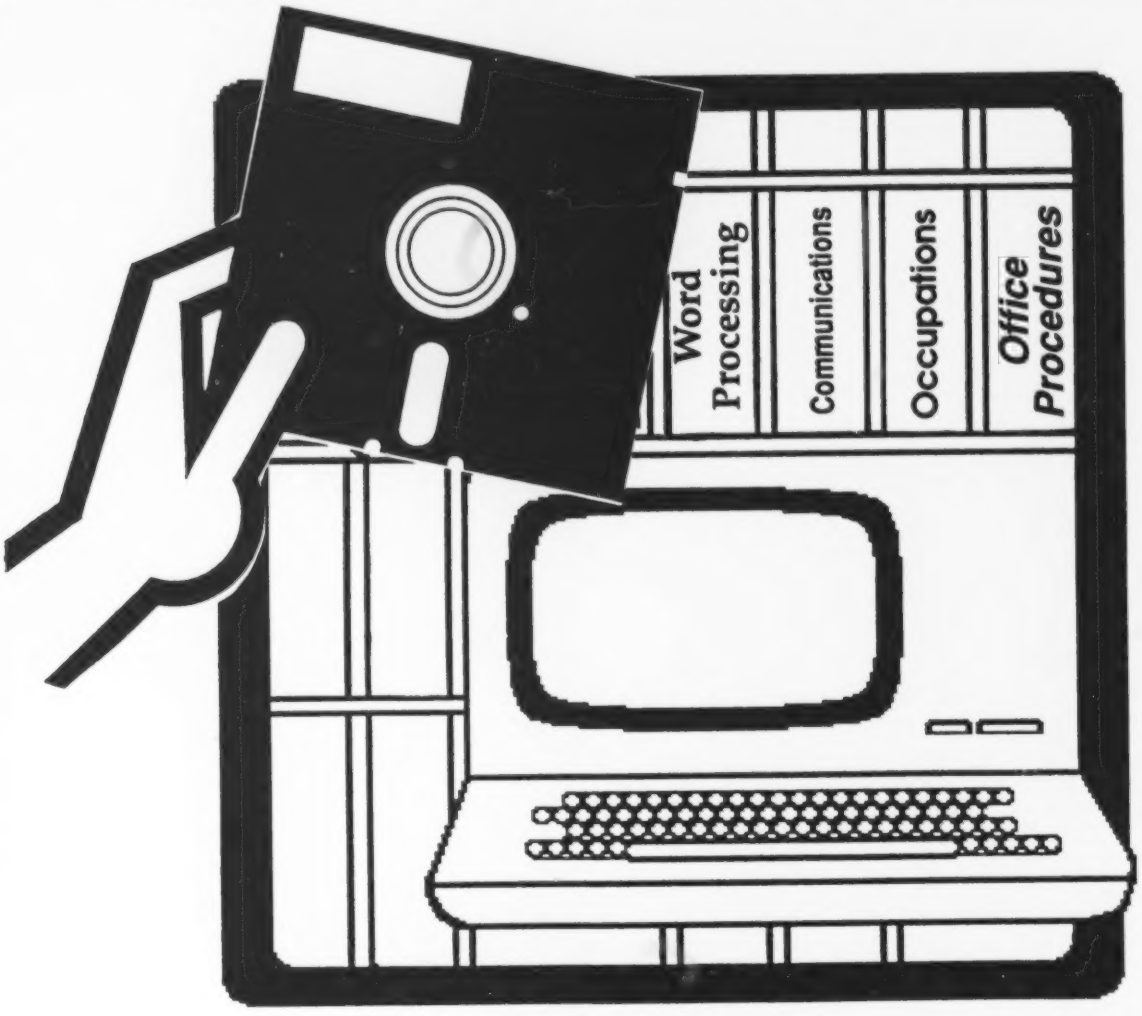
Office Systems

Competency Based Program

Content Standards for Office Occupations



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Office Systems

Competency Based Program Content Standards for Office Occupations

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The Department of Education recognizes the work of several committees and individuals who contributed many hours to write and review the content for the Office Systems Standards.

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Marketing Technical Committee

Clackamas Regional Business Education Teacher Articulation Committee

Deschutes Regional Business Education Teacher Articulation Committee

The contribution of the V-TECS Consortium is also recognized. The national task list was used as a foundation for this document.

For further information, contact the Specialist for Business and Office Occupations at 378-3590.

TABLE OF CONTENTS

	Page
INTRODUCTION	1
Secondary/Postsecondary Articulation	1
Program Description	1
Occupational Training	2
PROCESS FOR PROGRAM APPROVAL	3
Program Goals	3
OFFICE SYSTEMS APPROVAL CRITERIA	5
OFFICE SYSTEMS PROGRAM CONFIGURATION OPTIONS	6
COURSE TITLES & DESCRIPTIONS	6
CONTENT STANDARDS COURSE MATRIX	11
COMPETENCY STATEMENTS	19
Basic Skills	19
Technical Skills	20
DEFINITIONS	25
CURRICULUM REFERENCES	27
APPENDICES	29
A. Essential Learning Skills	31
B. Competency Profile	37
C. Competency Certificate	40

INTRODUCTION

Information included in this publication is for use by district-level curriculum planners, teachers, regional coordinators, or Department of Education staff involved with new program development or revisions of existing programs. For more information about instructional content, contact the Business Education Specialist at the Oregon Department of Education.

The approval criteria for an office systems cluster program are set forth in this document. The cluster format is designed for your convenience in planning a program to meet the entry level needs of office support workers, as well as to help prepare students for a postsecondary learning experience. Program goals, including employment skills and attributes, have been based on skill outcomes identified by representatives from business and industry.

An approved office systems cluster program requires at least four (4) credits with minimum core content. Program content is organized by **suggested** course title.

This document replaces the *Office Systems Cluster Brief* and outlines the approval criteria for a competency-based program. All new content standards documents will use the competency-based format. As these documents are produced, secondary programs will be approved under the competency-based system of instruction. For Office Systems, the new standards become effective January 1990 and all clerical and secretarial programs must be converted to Office Systems by September 1991.

This document is the equivalent to the *Common Curriculum Goals* publications for required subjects. Also the *Essential Learning Skills* (ELS) are cross referenced to the suggested course titles (refer to page 31-36). Cross-referencing local courses or course titles satisfies the requirement to infuse ELS for elective courses, however, some districts may require teachers to identify ELS in their planned course statements.

Secondary/Postsecondary Articulation

The content standards may be used as a basis for connecting office occupation competencies between the high school and the community college. Teachers interested in articulation should use the competency profile to document achievement in each skill area (refer to Appendix).

Regional articulation efforts in curriculum planning and development should be coordinated with these content standards to better identify the degree of competency matching.

Program Description

The instructional program is outlined in terms of:

- Program goals
- Program approval criteria
- Program configuration options
- Course titles and descriptions

- Content standards
  - Basic skills
  - Technical skills
  - Employment skills and attributes

Content standards are formatted by major duty area and related tasks. Matching competency statements for basic skill and technical skill are provided to give clarity for teaching the competency.

These content standards are cross referenced with the Lane County Office Systems/Accounting computer-based task list. Recommended resources for curriculum planning are located on page 27.

The student competency profile is to be used by the instructor to record student achievement as each competency is accomplished (refer to pages 37-39). The profile includes a student data sheet and competencies list, and should be reproduced for each student. The Certificate of Achievement should be awarded to the student upon program completion and be a part of the student's permanent record.

Occupational Training

The content standards are based on occupational information taken from the Oregon Office Systems and Marketing Technical Committee Reports and the Lane County Office Systems Committee (20 business representatives from Lane County) task list. The Office Systems Technical Committee identified the occupational training areas associated with the following office systems careers:

Secretary (often includes a variety of management support duties)
Receptionist
Typist/Clerk
Word Processing Operator
Data Processing Operator

The content standards task list was validated by the Oregon Business Education Council, an advisory council to the Business Education Specialist.

PROCESS FOR PROGRAM APPROVAL

1. Refer to the *Criteria for Secondary Vocational Programs* for application requirements.
2. Review guidelines in this document for cluster approval on page 5.
3. Review options for program configuration on page 6.
4. Submit the following materials with the application:

   - ***Form 581-4616 (Rev. 2/88)***

   - ***Planned course statements which include: program goals, a course description (page 6), course goals and competency statements***

   - ***Completed Course Matrix***

     Photocopy course matrix (pages 11-17). Fill in your program course titles where indicated and identify tasks taught in each course by placing a check in the appropriate column. All tasks that are required core competencies (shown in italics) must be included in your matrix and all tasks must be validated by a local advisory committee. The advisory committee signature on page 2 of Form 581-4616 may be used to meet this requirement.

   - ***Essential Learning Skills***

     A matrix of the Essential Learning Skills (ELS) is included in the appendix. The matrix identifies the Essential Learning Skills and the courses where the ELS would commonly be taught and tested.

     Using the course matrix on pages 11 to 17, and the ELS matrix in the appendix, identify the Essential Learning Skills for each task listed on the course matrix. In the space provided on the right side of the course matrix, indicate the number or numbers (1.2a, 3.1b) of the Essential Learning Skills, taught and tested in the process of teaching the task identified. You may also want to identify those skills which are reinforced and tested or reinforced only.

Program Goals

The following goals are designed to help students obtain entry-level employment upon high school graduation and/or to prepare for a postsecondary learning experience:

- Identify office systems career options, plan for a career, develop skills to enter and advance in chosen career.
- Demonstrate fundamental employability skills and attributes in the classroom and on-the-job work experience.
- Perform keyboarding services.
- Perform business calculations.
- Use communication skills.
- Use office procedure and organizational skills.
- Use transcription and dictation skills.

- Acquire job searching skills.
- Work in an office simulated environment and demonstrate problem solving through critical and creative thinking skills.
- Acquire leadership skills through FBLA integration.

OFFICE SYSTEMS VOCATIONAL CLUSTER APPROVAL CRITERIA—A MINIMUM OF FOUR CREDITS IN FOUR YEARS*

In addition to specific cluster criteria, state-approved vocational programs must meet the criteria for approval of all secondary vocational education instruction as listed in the Approval Criteria for Secondary Vocational Programs.

NOTE: Schools **are not** required to use the suggested course titles listed below. The local curriculum may be structured using course titles specific to an individual school. Minimum content standards must be included in the proposed program. Pages 6-10 identify the content recommended for state course titles.

Program Credit Requirements:

A minimum of four credits offered within a maximum of four years to include*:

1. Two credits must include the following courses**:
   - 1/2 credit Communications and Technology
   - 1/2 credit Office Procedures
   - 1/2 credit Word Processing I
   - 1/2 credit Word Processing II

2. Two or more credits from the following courses:
   - 1/2 credit Business Machines/Math
   - 1/2 credit Vocational Shorthand
   - 1/2 credit Business Information Processing I
   - 1/2 credit Business Information Processing II (simulation)
   - 1/2 credit Bookkeeping/Recordkeeping
   - 1/2 credit Cooperative Work Experience

3. Instructional time blocks of sufficient duration for skill development to meet industry standards (a two-hour block not required).

4. A planned course statement for each course which includes program goals, course goals instructional content and course description.

5. Vocationally certified teacher.

6. An active, representative occupational advisory committee.

7. Leadership and interpersonal skill development as an integral part of the instructional program—may be provided through the vocational student leadership organization, Future Business Leaders of America (FBLA).

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* One credit equals 36 weeks of classroom instruction for approximately 45 minutes a day for a total of 130 hours of instruction.

** Please refer to the Content Standards Course Matrix for tasks that correspond to the core courses (in italics). These competencies are required for program approval.

OFFICE SYSTEMS PROGRAM CONFIGURATION OPTIONS

Listed below are three program configuration options for Office System programs. The minimum program includes only the four credits required for Office Systems cluster approval. Configuration options 2 and 3 provide a more comprehensive approach to program planning for competency-based education.

Minimum Criteria—Option 1	**Credits**
Communications & Technology	1/2
Word Processing I & II	1
Office Procedures	1/2
Bookkeeping/Recordkeeping	1/2
Business Machines/Math	1/2
Business Information Processing I	1/2
Cooperative Work Experience	1/2
	4 credits - 2 year program

Option 2	**Credits**
Communications & Technology	1/2
Word Processing I & II	1
Office Procedures	1
Bookkeeping/Recordkeeping	1
Business Information Processing I	1/2
Business Machines/Math	1/2
Cooperative Work Experience	1/2
	5 credits - 3 year program

Option 3	**Credits**
Communications & Technology	1
Word Processing I & II	1
Office Procedures	1
Bookkeeping/Recordkeeping	1
Business Machines/Math	1/2
Vocational Shorthand	1
Business Information Processing I & II (simulation)	1
Cooperative Work Experience	1/2
	7 credits - 4 year program

Course Titles and Descriptions

Communications and Technology (1/2 to 1 credit)

This course is designed to teach verbal, nonverbal and written communications. Basic and related English/writing skills will be taught and reinforced.

Competencies taught:

- *Oral presentation skills.*
- *Listening skills.*
- *Grammar, punctuation and spelling skills.*
- *Nonverbal and professional image skills.*
- *Composition skills (dictation and written).*
- *Edit and revise written communications.*
- *Written communication/business letters and documents.*
- *Business protocol and etiquette.*
- *Communication techniques for three office system models.*
- *Basic judgment and decision-making skills.*

Credit for English/writing is encouraged by specific competency matching of common curriculum goals. Machine transcription could be taught in this course. The use of computer technology and electronic typewriters is encouraged as a mode to learning and application of these skills.

Word Processing I & II (1 to 2 credits)

Prerequisite: *Operation of Keyboard by Touch* (initial instruction)
These courses are designed to teach basic and advanced skills through the manipulation of processing equipment: electronic typewriters, microcomputers, and computer systems.

Competencies taught:

- *Operate all alpha and numeric/symbol keys by touch.*
- *Know basic operation of function keys and machine parts.*
- *Proper keyboarding techniques.*
- *Apply word division and punctuation rules.*
- *Apply document formatting skills.*
- *Input rough draft copy and apply proofreading techniques.*
- *Enhance business documents.*
- *Prioritize tasks and apply workflow techniques.*
- *Editing and revision, judgment and decision-making skills.*
- *Apply correct punctuation, grammar and spelling rules.*
- *Perform speed and accuracy standards.*
- *Meet production standard for mailable/correctable documents.*

Credit for English/writing is encouraged by specific competency matching of common curriculum goals.

Business Machines/Math (1/2 to 1 credit)

This course is designed to teach a variety of machines used in the modern office. Major focus, however, should be placed on the electronic calculator and basic math skills.

Competencies taught:

- *Operation electronic calculator by touch.*
- *Application of business math skills: convert fractions, decimals and percentages to equivalent forms.*
- *Application of computational skills to recordkeeping/bookkeeping tasks.*
- *Specific skill building techniques per machine.*

- *Operation of reprographic (electronic and electric) equipment.*
- *Machine transcription skills (manipulation of recorder and transcriber).*
- *Telecommunications equipment skills.*
- *Performance of speed and accuracy standards.*

Credit for math is encouraged through competency matching of common curriculum goals.

Office Procedures (1/2 to 1 credit)

This course is designed to teach job specific duties and related tasks in a series of steps followed in a regular defined order which dictate how office workers perform their functions.

Competencies taught:

- *Performance of telephone techniques.*
- *Human relations skills.*
- *Machine transcription and dictation skills.*
- *Records management (filing skills).*
- *Electronic communication processes (use of network).*
- *Workflow processes (simulated environment).*
- *Organizational and management skills.*
- *Mail responsibilities.*
- *Reprographic skills.*
- *Identification of office occupations.*
- *Problem-solving, decision-making and critical-thinking skills.*
- *Acquisition of job search skills.*
- *Identify types of office systems and procedures.*

Simulated business environments are encouraged to enhance the procedures cycle and paper process of an actual office setting.

Vocational Shorthand (1/2 to 2 credits)

This course may utilize a variety of shorthand systems and teaching styles. Communication skills should be taught and reinforced in this course.

Competencies taught:

- *Dictation skills.*
- *Transcription skills.*
- *Speed and accuracy standards.*
- *Business English and writing skills.*

Credit for English/writing is encouraged by specific competency matching to common curriculum goals.

Business Information Processing I & II (simulation) (1/2 to 2 credits)

This course is designed to teach procedures that turn data and words into information processing. Options for the introduction of integrated software, and software used in business and industry (state of the art), could be provided for in this course.

Competencies taught:

- *Manipulation of specific software packages.**
- *Electronic office procedures and protocol.*
- *Electronic process skills (i.e., electronic mail, filing, calendaring/ scheduling, document transfer).*
- *Workflow, processes and procedures on a local area network, in a computerized office, and in a traditional office.***
- *Performance of office support services.*
- *Work efficiency and productivity.*
- *Awareness of desk top publishing techniques.*
- *Spreadsheet skills.*
- *Database skills.*

Credit for computer literacy is encouraged by specific competency matching of common curriculum goals.

Bookkeeping/Recordkeeping (1/2 to 1 credit)

This course is designed to teach bookkeeping/recordkeeping skills with financial records for the office support position. Maintaining financial records, along with interpreting and analyzing them is the major focus of this course.

Competencies taught:

- *Application of business math skills.*
- *Complete invoicing.*
- *Making bank deposits and statement reconciliation.*
- *Preparation of bookkeeping/recordkeeping forms.*
- *Computation of payroll, petty cash handling.*
- *Transferring information from a source document to a permanent record.*
- *Concepts of receipts, payments, sales and purchases.*

Credit for math is encouraged through competency matching of common curriculum goals.

Cooperative Work Experience (1/2 to 2 credits)

Work experience in the office systems cluster is set up to form a partnership between business and the high school program to reinforce and enhance the skills learned in cluster courses.

Procedure:

- *The office systems instructor and employer outline individual student's responsibilities.*
- *A training agreement is signed.*
- *Job experiences are coordinated with classroom instruction and on-the-job activities.*
- *A training plan is developed for each student which details tasks to be learned on the job.*

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* This course could also be identified as a basic course to a variety of computer software skills as a prerequisite to a more advanced course.

** This course could be used for a specialization in workflow simulation (i.e., electronic office simulation, legal/ medical/technical simulation).

- *The employer, student, teacher and parents/guardians sign all agreements.*
- *Refer to 2+2 Data Base for career and course competency comparisons* (see section on page 25).

Purpose of duty and task list course matrix and competency statements:

The program standards are listed on pages 11-17 in a duty and task format. State and local business advisory committees recommend this task listing for entry level employment. Duties are identified as major skill areas needed for office occupations. The tasks identified under each duty indicate specific competencies needed to perform the duty.

Code numbers, in parentheses following each task/competency statements, are given for additional support in planning a strong business program. These code numbers are cross-referenced in the Office Systems and Accounting Task List, Lane County Vocational Education Consortium (e.g., OAC01). Please refer to the resource section on page 27 for further documentation.

Competency statements are provided on pages 19-24 to explain the condition, level of performance, and recommended standard needed for a student to meet the competency. Current business and industry standards may vary throughout the state. Local advisory committees should be used to determine a qualifying standard to validate each skill competency.

The suggested course model curriculum, shown on pages 6-10, has been placed on a course matrix as a recommendation for program planning. The (x) indicates in what courses the task could be taught. For ease in developing course descriptions (needed to accompany program approval forms), teachers are encouraged to photocopy the program standards duty and task list, fill in the local course titles, and check the competencies taught in each course.

CONTENT STANDARDS COURSE MATRIX

(Required core competencies are in italics)

(Alpha = duties)
(Numbers = tasks)

Duty Task Number	Commun & Technol	Word Proc I & II	Business Mach/Math	Office Procedures	Vocational Shorthand	Bus Info Proc I & II	Bookkpg/Recordkpg		FBLA Integration										ELS
	Local Course Titles																		
BASIC SKILLS																			
A. ***Basic Reading Skills (OAC01-02)***	x	x	x	x	x	x	x		x										
B. ***Basic Arithmetic Skills (OAA01-19)***	x	x	x	x	x	x	x		x										
C. ***Communication Skills (OAB01-51)***																			
1. ***Written***	x	x	x	x	x	x	x		x										
2. ***Verbal/nonverbal***	x	x	x	x	x	x	x		x										
3. ***Listening***	x	x	x	x	x	x	x		x										
D. ***Problem-Solving Skills***																			
1. ***Analyze problem***	x	x	x	x	x	x	x		x										
2. ***Identify alternatives***	x	x	x	x	x	x	x		x										
3. ***Plan of action***	x	x	x	x	x	x	x		x										
E. ***Basic Keyboarding Skills***																			
1. ***Operate keyboard by touch (computer/ typewriter)***	x	x	x	x	x	x	x		x										
a. ***Alpha/numeric keys***	x	x	x	x	x	x	x		x										
b. ***Function keys***	x	x	x	x	x	x	x		x										
c. ***Ten-key pad***		x	x	x		x	x		x										
2. ***Use correct techniques***	x	x	x	x	x	x	x		x										
F. ***Identify Office Occupations/Careers***	x	x	x	x	x	x	x		x										
TECHNICAL SKILLS																			
A. ***Perform Keyboarding Services***																			
1. ***Demonstrate skill in basic document formatting (letter, table, manuscript) (OED01-77)***			x						x										
2. ***Input from draft copy and apply proof-reading techniques (OED01-3) (OEC01)***	x	x	x		x	x			x										
3. ***Enhance the professional appearance of business documents (OEB01-32)***		x	*			x			x										

*Indicates Level II of Courses, i.e. Word Processing II

Duty	Task Number	Commun & Technol	Word Proc I & II	Business Mach/Math	Office Procedures	Vocational Shorthand	Bus Info Proc I & II	Bookkpg/Recordkpg		FBLA Integration										ELS
		Local Course Titles																		
	4. ***Apply correct punctuation, capitalization, grammar and spelling rules (OAB01-51)***	x	x	x	x	x	x	x		x										
	5. ***Prioritize tasks and apply workflow techniques (OAB)***	x	x	x	x	x	x	x		x										
	6. ***Apply computer formatting, editing and advanced proofreading techniques (OEB01-32)***		x		x		x			x										
	7. ***Apply computer skills to business information processing software (i.e., spreadsheet, data base, graphics and desktop publishing) (ODA01-16, ODB01-27)***		x				x			x										
	8. ***Perform speed and accuracy standards (ODC01-14)***		x				x			x										
	9. ***Meet production standard for mailable/ correctable documents***	x	x		x	x	x			x										
B.	***Perform Business Calculations***																			
	1. ***Operate electronic calculator by touch, using proper key entry techniques (OEF01-17)***			x			x	x		x										
	2. Apply business math skills: (OEF01-17)																			
	a. Convert fractions, decimals, and percents to equivalent forms			x	x		x	x		x										
	b. Discount, interest, estimation, depredation, pro rata, mark-up, and mark-down			x			x	x		x										
C.	***Perform Bookkeeping/Recordkeeping Services***																			
	1. Complete invoices (OOB 05)						x	x		x										
	2. Prepare deposits, and reconcile bank statements (OQA 04-OQA 07)			x			x	x												
	3. Prepare bookkeeping/recordkeeping forms (OOB01-05, OOF01, ONB 04, OQD 06, ONC 04, OPC01)						x	x		x										
	4. Compute payroll (OSC01-11, OSD01-2, OSE01-08)						x	x												
	5. Transfer information from source document to permanent record (sections OND, ONE, ONF, OOA, OOD, OOE, OPC, OSE)						x	x		x										
	6. Analyze bookkeeping/recordkeeping documents and identify the effects on the business (see task #3)						x	x												

*Indicates Level II of Courses

| Duty Task Number | Local Course Titles | | |

Duty Task Number	Local Course Titles																				
	Commun & Technol	Word Proc I & II	Business Mach/Math	Office Procedures	Vocational Shorthand	Bus Info Proc I & II	Bookkpg/Recordkpg		FBLA Integration												ELS
13. *Perform problem-solving, decision-making and critical-thinking skills*	x	x	x	x	x	x	x		x												
F. *Use Vocational Shorthand Skills*																					
1. Perform dictation skill (OLA01-08)					x	x			x												
2. Perform transcription skill (OLB01-05)	x	*			x	x			x												
3. Perform speed and accuracy standard for vocational shorthand		x			x	x			x												
G. *Work in a Simulated Environment*																					
1. Identify workflow, processes and procedures on a local area network (ODA01-16+, OFC01-12)						x															
2. Identify workflow, processes and procedures in an information processing computerized office (ODA01-16+)		*				x															
3. Identify workflow, processes and procedures in a traditional (limited computer use) office (OBA/B/D)		x		x																	
4. Perform office support duties to include appointments, meetings, conferences, travel and teleconferencing in traditional or automated office settings		x		x		x			x												
5. Analyze work efficiency and office system for greatest productivity (OMA01-05, OMB01-06, OBA01-04)		*				x			x												
6. Apply safety rules and procedures	x	x	x	x	x	x	x		x												
H. *Leadership Skills (FBLA Competencies)*																					
1. Demonstrate competent assertive business leadership		x				x			x												
2. Demonstrate an understanding of American business enterprise						x			x												
3. Develop individual projects that contribute to the improvement of the community		x	x			x			x												
4. Develop character, prepare for useful citizenship and foster patriotism	x	x	x	x	x	x	x		x												
5. Practice and demonstrate efficient money management through FBLA activities				x		x	x		x												

*Indicates Level II of Courses

Duty Task Number	Local Course Titles: Commun & Technol	Word Proc I & II	Business Mach/Math	Office Procedures	Vocational Shorthand	Bus Info Proc I & II	Bookkpg/Recordkpg		FBLA Integration										ELS
FUNDAMENTAL EMPLOYMENT SKILLS AND ATTRIBUTES																			
A. *Work Maturity/Attitudes*																			
1. Dependability/Appropriate Conduct (OGC01-50)	x	x	x	x	x	x	x		x										
a. Attendance																			
b. Promptness																			
c. Follow through																			
2. Flexibility/Adaptability (OGC01-50)	x	x	x	x	x	x	x		x										
a. Open mindedness																			
b. Ability to change																			
3. Motivation (OGC01-50)	x	x	x	x	x	x	x		x										
a. Willing to learn																			
b. Initiative																			
4. Productivity (OGC01-50)	x	x	x	x	x	x	x		x										
a. Organize tasks																			
b. Time management																			
c. Efficient																			
d. Accuracy																			
1) Ability to file forms																			
2) Complete forms																			
3) Produce counts																			
4) Legible handwriting																			
5. Loyalty (OGC01-50)	x	x	x	x	x	x	x		x										
6. Confidence (OGC01-50)	x	x	x	x	x	x	x		x										
a. Job testing techniques																			
b. Selling your skills																			
c. Forthrightness																			
7. Sensitivity (OGC01-50)	x	x	x	x	x	x	x		x										
a. Coworker																			
b. Customers/clients/guests																			
c. Positive contribution to morale																			
8. Accepts Constructive Criticism in Evaluation/Professional Growth (OGC01-50)	x	x	x	x	x	x	x		x										
9. Accepts Responsibility (OGC01-50)	x	x	x	x	x	x	x		x										
10. Takes Pride in Work (OGC01-50)	x	x	x	x	x	x	x		x										
11. Honesty (OGC01-50)	x	x	x	x	x	x	x		x										
12. Grooming and Appearance (OGC01-50)	x	x	x	x	x	x	x		x										

*Indicates Level II of Courses

Duty Task Number	Commun & Technol	Word Proc I & II	Business Mach/Math	Office Procedures	Vocational Shorthand	Bus Info Proc I & II	Bookkpg/Recordkpg	FBLA Integration									ELS
	Local Course Titles																
B. *Job Acquisition Skills*																	
1. Locate Job Market Information (OGB01-15)		x				x		x									
a. Placement office																	
b. Acquaintances/friends																	
c. Governmental employment office																	
d. Private recruiting firms/agencies																	
e. Publications																	
f. Prospecting																	
g. Research potential employer																	
2. Knowledge of Company/Job (OGB01-15)		x				x		x									
3. Portfolio (OGB01-15)	x	*				x		x									
a. Resume																	
b. Cover letter for portfolio content																	
c. Letters of recommendation																	
d. Competency profile (examples of work, CWE, titles, degrees and awards)																	
4. Letter of Application/ Individualized Cover Letter/Telephone Inquiry (OGB01-15)	x	*				x		x									
5. Appropriate Attire (OGB01-15)		x		x		x		x									
6. Application (OGB01-15)		x		x		x		x									
7. Interview (OGB01-15)	x			x		x		x									
a. Meaningful questions																	
b. Honesty																	
c. Good eye contact																	
d. Personal inventory testing																	
1) Competencies																	
2) Personality test																	
e. Follow-up letter/phone call/visit																	
8. Locate Job Market Information (OGB01-15)		x				x		x									
a. Placement office																	
b. Acquaintances/friends																	
c. Governmental employment office																	
d. Private recruiting firms/agencies																	
e. Publications																	
f. Prospecting																	
C. *Human Relations Skills*																	
1. Understand and Act With Empathy Toward Others (OGC01-50)	x	x	x	x	x	x	x	x									
a. Ability to get along with others																	
b. Ability to compromise																	

*Indicates Level II of Courses

Duty Task Number	Local Course Titles: Commun & Technol	Word Proc I & II	Business Mach/Math	Office Procedures	Vocational Shorthand	Bus Info Proc I & II	Bookkpg/Recordkpg		FBLA Integration									ELS
2. Dealing With Conflict and Stress (OGC01-50)	x	x	x	x	x	x	x		x									
3. Team Attitude (importance of acceptance) (OGC01-50)	x	x	x	x	x	x	x		x									
a. Into group																		
b. With group decisions																		
4. Participate/Contribute Effectively in Groups (OGC01-50)	x	x	x	x	x	x	x		x									
a. Understand group dynamics																		
b. Adapt personal skills to fit group needs																		
c. Present ideas																		
d. Handle success and rejection																		

Fundamental Employment Skills and Attributes were prepared by the Marketing Technical Committee and adopted by the Office Systems Technical Committee

*Indicates Level II of Courses

COMPETENCY STATEMENTS

The following competency statements are provided to explain the condition, level of performance and recommended standard needed for a student to meet the competency. Current business and industry standards may vary throughout the state. Local advisory committees should be used to determine a qualifying standard for each skill competency.

Basic Skills

A. Basic Reading Skills

1. Given a business document (average readability level), demonstrate ability to read and comprehend content by responding correctly to the directives in the document.

B. Basic Arithmetic Skills

1. Given a business situation requiring math computation, demonstrate basic math competencies (addition, subtraction, multiplication, division) with 100 percent accuracy.

C. Communication Skills

1. Given a business topic, write a paper that demonstrates basic writing skills (developing coherent paragraphs, sentences with correct sentence structure, verb forms, plural forms, word choice, and other mechanics of writing) with complete accuracy.
2. Given an interpersonal business situation, demonstrate ability to communicate basic verbal (conversation with small groups, with individuals, introductions) and nonverbal (etiquette, body language, gestures) skills in an appropriate manner meeting social standards.
3. Given a business meeting, demonstrate basic listening skills (concentration, distraction reduction, response to speaker) by clearly and accurately responding to follow-up questions.

D. Problem-Solving Skills

1. Given a basic business problem, demonstrate basic problem-solving skills (analyze the problem, determine alternatives, and establish a plan of action) in meeting accepted standards; i.e., "Six Steps Approach," *NBEA Curriculum Guide*, pp. 4-30.

E. Basic Keyboarding Skills

1. Given a basic business document, demonstrate keyboarding skills (touch method for alpha/numeric/symbol keys, correct techniques, and use function keys) to accepted standard.

F. Identify Office Occupations/Careers

1. Given a list of common office occupations, identify the careers that have the greatest potential for growth and advancement, and develop a career plan for future employment.

Technical Skills

A. Perform Keyboarding Services

1. Given a basic business document (letter, table, manuscript, memo) demonstrate skill in performing formatting functions to include setting margins and tabs, spacing, centering and alignment at the designated performance standard.

2. Given a business document, apply proofreading skills, mark formatting, typographical, mechanical and content errors with 100 percent accuracy.

3. Given criteria for a business document (letter, manuscript, table, report), organize criteria to utilize format and print options, document styles, and other design enhancements based on current business and industry trends.

4. Given a draft copy of a business document, identify and correct punctuation, capitalization, grammar, word division and spelling rules following currently approved standards.

5. Given draft copies of business documents, to be completed in a predetermined length of time, prioritize tasks and apply workflow techniques to meet industry standards.

6. Given a disk file of word processing document, apply computer formatting, editing and advanced proofreading techniques that utilize current software packages, used in business and industry, to meet approved standards.

7. Given a series of business projects and business information processing software packages (i.e., spreadsheet, data base, word processing, graphics and desktop publishing), determine correct application to process information and complete each task at the approved standard.

8. Given a business document (letter, memo, report, table, manuscript, business form), organize and key document at the designated performance standard.

9. Given draft copies to input, produce documents in a mailable formal, (free of keyboarding, punctuation, capitalization and spelling errors) to meet current production standards for business and industry.

B. Perform Business Calculations

1. Given statistical data, demonstrate the use of the ten-key pad by touch, using proper key entry techniques, within currently approved speed and accuracy standards.

2. a. Given basic business application problems relating to math concepts (fractions, decimals, percents), compute and solve problems with 100 percent accuracy.
   b. Given business math applications relating to discount, interest, estimation, depreciation, pro rata, mark-up and mark-down, solve problems with 100 percent accuracy.

C. Perform Bookkeeping/Recordkeeping Services

1. Given sales invoices, copy the name of the customer, terms, invoice number, and the amount of the sale to a sales journal or other columnar form with accuracy and so that all information is legible.

2. Given a bank statement, cancelled checks and a check register with deposits, reconcile the bank statement with complete accuracy.

3. Given business forms and documents such as: promisory note, bank draft, sales invoice, payroll check, purchase requisition, purchase invoice, inventory card, petty cash voucher/ receipt complete each form or document with 100 percent accuracy.

4. Given payroll records (payroll register, time card, earnings record, employees withholding exemption form), complete each record with 100 percent accuracy.

5. Given source documents such as purchase orders, sales invoices, checks, etc., and transactions to be recorded on each document, enter the transactions so that all writing is legible, all data is correctly recorded in the appropriate blanks and columns, and all calculations are correct.

6. Given business documents involving purchases, sales, borrowing, repaying a debt, payment of utilities or similar transactions, analyze each document and explain what its effect would be upon the business with at least 90 percent accuracy.

D. Use Communication Skills

1. Given a current business-related topic, develop topic and orally present it in a clear and effective manner.

2. Given a business situation (conversation, discussion, presentation, oral direction), apply listening skills and respond to each situation in a clear, accurate and professional manner.

3. Given a business situation, determine appropriate type of correspondence needed, use composition skills to write documents using correct grammar, punctuation, capitalization and spelling rules at the current business and industry standards.

4. Given an interpersonal situation in the office, demonstrate the proper verbal (language, voice tone, discussion methods, and preplanned conversation outcome) and nonverbal (attitude, body language, sensitivity, and empathy) skills needed to create a positive outcome.

5. Given role-play situations involving an office worker, guests and/or callers in the office, demonstrate proper business manners for introducing office guests or callers and situations which involve negative confrontation to create positive outcomes.

6. Given a situation (telephone calls, meetings requiring minutes, daily assignments, project instructions, training sessions) requiring notetaking skills, demonstrate ability to take and transcribe notes with 100 percent accuracy.

E. Use Office Procedures and Organisational Skills at the Workstation

1. Given simulated situations involving various telephone systems, identify the appropriate telephone features (memory, speed and automatic dialing, call waiting, queing and forwarding, and conference call) to efficiently accept incoming calls and place outgoing calls with complete accuracy.

2. Given a simulated telephone situation involving a call, identify appropriate telephone etiquette and rules of courtesy in handling the call in a professional business manner.

3. Given a series of directives, and an assignment to utilize electronic communications (voice mail, facsimile, electronic mail, or data base access) identify the mode (modem, network, telephone, facsimile, compact disc) and process needed for the most efficient transmission of data.

4. Given a tape/disc of business documents to transcribe, a transcribing machine, and a keyboard, use correct machine controls, and apply proper techniques to produce a business document that meets the business/industry standard.

5. a. Given business documents to file or retrieve, utilize appropriate filing rules (alphabetical, numeric and subject) to file or retrieve documents with 95 percent accuracy.

   b. Given various situations requiring decisions for efficient storage and retrieval of records (computer output micro-records, computer input micro-records, electronic files, and computer aided retrieval), identify the most appropriate records management system.

6. Given a situation requiring mailing or receiving of a letter or package, use appropriate procedures to date, sort, route (special services), and/or use mailroom equipment (postage meter, scales, folder/collator or burster) completely and accurately.

7. a. Given camera-ready documents to be reproduced for dissemination, determine appropriate options for reproduction (photocopy, facsimile, print shop, computer modem) based on quantity, quality, speed and cost.

   b. Given master copy of document, choose print options (copy or typeset) paper options (color, weight, letterhead, size), finished copy options (bound, stapled, three-hole punched, shrink-wrapped, book form) based on standards applicable to business needs.

8. Given source documents and business bookkeeping records, use appropriate procedures to analyze and process recordkeeping transactions with complete math accuracy and following accepted accounting procedures.

9. Given a business situation requiring the use of reference materials, gather information from appropriate reference sources (secretarial handbook, dictionary, thesaurus, English reference manual, documentation manuals, business journals) citing correct information.

10. Given a specific business assignment, identify the process and steps necessary to organize, prioritize and manage the duties of the work assignment by meeting the standards set forth.

11. Given job-related tasks to be accomplished, establish workflow chart showing steps and timelines needed to complete tasks in a timely and cost-efficient manner.

12. Given case studies dealing with business-related problems on the job, including conflict and criticism, identify basic human relation skills needed to correct the situation in a professionally accepted manner.

13. Given a situation that demands a solution to a business problem, follow the proven problem solving and decision-making steps that utilize critical thinking skills to explain a rational solution.

F. Use Vocational Shorthand Skills

1. Given a directive to take dictation in a business situation, use the appropriate shorthand system (symbolic, alphabetic or with stenotype machine) or directly into the keyboard, take dictation that can be transcribed with 100 percent accuracy into a mailable document.

2. Given dictation and a keyboard, transcribe business documents from stenotype tape or steno pad, apply formatting, proofreading and editing rules to produce a document that meets the business and industry standard.

3. Given a dictation or transcription task, perform the task within currently approved speed and accuracy standards.

G. Work in a Simulated Environment

1. Given a simulated environment in an automated office setting that includes a local area network, demonstrate skill in processing information that meets a recommended workflow pattern using efficient procedures to produce office support services at the business and industry standard.

2. Given a simulated environment in an computerized office setting that does not include a local area network, demonstrate skill in processing information that meets a recommended workflow pattern using efficient procedures to produce office support services at the business and industry standard.

3. Given a simulated environment in a traditional office setting with limited computer capabilities, demonstrate skill in processing information that meets a recommended workflow pattern using efficient procedures to produce office support services at the business and industry standard.

4. Given a simulated office setting, perform office support duties to include appointments, meetings, conferences, travel, and teleconferencing arrangements, that demonstrate skill in adaptability and cooperation to develop an efficient work team.

5. Given a simulated office situation, analyze the level of efficiency of the given situation, and identify the steps necessary to assure the greatest level of productivity to meet business and industry standard.

6. Given a simulated office setting, apply safety rules and procedures to the performance of office support duties in compliance with safety standards of business and industry.

H. Leadership Skills (FBLA Competencies)

1. Given an assigned task, demonstrate leadership abilities by accepting responsibility, displaying a positive attitude toward the work, showing pride in accomplishment of the task, and working with and without supervision as demanded by employment standards.

2. Given a business-related project, demonstrate entrepreneurship skills that strengthen economic free enterprise in our democratic society to match federal, state and locally approved guidelines.

3. Given a community improvement need (March of Dimes, MADD, Muscular Dystrophy, American Heart Association, etc.), develop goals and implement a project that responds to the need of the community in accomplishing the goals established.

4. Given a business or community interactive situation, demonstrate interpersonal skills and attributes (strong character, useful citizenship and patriotism) to secure a successful relationship between the business/community and individuals.

5. Given an FBLA activity that requires money management, perform accounting procedures endorsed by business and industry to secure an efficient money management system, and support a positive outcome.

DEFINITIONS

Competency Based Vocational Education—Where tasks of workers are identified and validated with industry/incumbent workers and instruction is based on the tasks and performance levels required by industry. Also called "performance based, outcome based, or mastery learning."

Competency—A knowledge, skill, attitude or judgment based on a task or tasks which the student demonstrates at a predetermined level.

Three types of competency statements exist for program approval in Oregon. Each statement contains the conditions, task/behavior and a standard of performance or demonstration.

a. **Employability**—Getting and keeping a job, worker attitudes, interpersonal skills, working as a team member, etc.
b. **Job Specific**—Skills needed to perform duties and tasks on the job and skills for job entry.
c. **Related Job Knowledge**—Information used to learn job specific skills or that is needed as background information to perform job skills.

Duty—Major activities involved in performing a job which consists of a collection of related tasks.

Task—A discrete unit of work performed by an individual. (Also called skill competency or behavior in some resources.)

Competency Statement (performance objective)—A statement that is based on the conditions and standards of a task performed by a worker in a job setting.

Competency Profile—A list of abbreviated tasks selected for the instructional program with a scale for rating student competency attainment.

Essential Learning Skills—Skills that are not unique to any one subject area and which students must learn in order to help them acquire other knowledge and skills. They consist of selected skills in reading, writing, mathematics, listening, speaking, study skills and reasoning (including critical thinking and scientific method) as adopted by the State Board of Education.

Common Curriculum Goals—The knowledge and skills expected of all students as a result of their educational experience; defined by the state as (a) the essential learning skills and (b) the common knowledge and skills in instructional programs as adopted by the State Board of Education. (NOTE: If academic credit is granted, then a correlation may need to be done.)

CURRICULUM REFERENCES

1. *Office Systems and Accounting Task List*, Lane County Vocational Education Consortium, Greg Harpole, Lane Community College.

   - Task List
   - Performance Guide
   - Occupational Articulation Software
   - Documentation for Software
     - Articulation
       — Business and Education
       — Secondary and Postsecondary
     - Curriculum Development
     - Career Planning
   - List of Office System Career Occupational Titles and Tasks

2. *Model Curriculum Standards and Program Framework for Office Education* (1987), California State Department of Education.

3. *Business Teacher Education and Curriculum Guide* ISBN 0-933964-25-0 (1987), National Business Education Association.

4. *Accounting Technical Committee Report* (1987), Oregon Department of Education.

5. *Essential Learning Skills in Vocational Technical Education* (1989), Oregon Department of Education.

APPENDICES

A. Essential Learning Skills

B. Competency Profile

C. Competency Certificate

Appendix A

Essential Learning Skills

This matrix identifies the Essential Learning Skills and the courses where the ELS would commonly be taught and tested.

For further explanation of the Essential Learning Skills taught and tested for the office systems cluster, please refer to *Essential Learning Skills in Vocational Technical Education* from the Division of Vocational Technical Education of the Oregon Department of Education.

End of Eleventh Grade Skill	Commun & Tech	Word Proc I & II	Business Mach/Math	Office Procedures	Vocational Shorthand	Bus Info Proc I & II	Bookkpg/Recordkpg		FBLA Integration
1. SYMBOL SYSTEMS									
1.1 RECOGNIZE WORDS									
b. Context clues	x	x	x	x	x	x	x		x
c. Affixes, root words	x	x	x	x	x	x	x		x
d. Written materials	x	x	x	x	x	x	x		x
1.2 DETERMINE MEANING									
a. Context clues, punctuation and syntax	x	x	x	x	x	x	x		x
b. Affixes and root words	x	x	x	x	x	x	x		x
c. Dictionaries, glossaries and definitions	x	x	x	x	x	x	x		x
1.3 STANDARD PRONUNCIATION									
b. Standard English	x	x	x	x	x	x	x		x
c. Oral presentations	x			x		x			x
1.4 QUANTITATIVE DATA									
a. Read, write and order numbers	x	x	x	x	x	x	x		x
b. Order, compare, and model commonly used fractions, decimals and percents			x	x		x	x		x
c. Mathematical terms and symbols of quantity, order and operation			x	x		x	x		x
d. Mathematical operations		x	x	x		x	x		x
e. Convert among decimals, percents and commonly used fractions			x	x		x	x		x

End of Eleventh Grade Skill	Commun & Tech	Word Proc I & II	Business Mach/Math	Office Procedures	Vocational Shorthand	Bus Info Proc I & II	Bookkpg/Recordkpg		FBLA Integration
1.5 DESCRIBE AND CLASSIFY									
a. Identify geometric shapes									
b. Model or make drawings in solving problems			x			x			
c. Symmetry, congruency and similarity									
d. Rectangular coordinate system									
1.6 MAKE PREDICTIONS									
a. Probability			x				x		
b. Tables, graphs, formulas and models		x	x	x		x	x		x
c. Displaying data									
d. Mean, mode, median, range and percentile			x				x		
e. Formulas solving problems		x	x	x		x	x		x
f. Ratio, percent and rates		x	x	x		x	x		x
g. Ratio and proportion			x			x	x		x
1.7 ESTIMATE AND MEASURE QUANTITIES									
a. Problem-solving strategy		x	x	x		x	x		x
b. Estimate answers		x	x	x		x	x		x
e. Measurements		x	x	x		x	x		x
i. Percentage problems			x			x	x		x
2. INTERPRET **LITERAL** MEANINGS									
2.1 IDENTIFY MAIN IDEAS									
a. Distinguish facts from opinions	x			x	x	x	x		x
b. Recall facts and opinions	x					x			
c. Arrange details	x	x	x	x		x	x		x
e. Follow directions	x	x	x	x	x	x	x		x
2.2 USE INSTRUCTIONAL MATERIALS									
a. Locate information	x	x	x	x	x	x	x		x
b. Preview and review	x	x	x	x	x	x	x		x
c. Diacritical markings	x	x	x	x	x	x	x		x
d. Thesaurus, almanac, *Bartlett's Quotations*	x	x		x		x			x

End of Eleventh Grade Skill	Commun & Tech	Word Proc I & II	Business Mach/Math	Office Procedures	Vocational Shorthand	Bus Info Proc I & II	Bookkpg/Recordkpg		FBLA Integration
2.3 USE ORAL COMMUNICATION									
a. Paraphrase	x			x	x	x			x
b. Oral directions	x			x		x			x
c. Ask questions	x	x	x	x	x	x	x		x
d. Share orally	x	x	x	x	x	x	x		x
e. Develop detail	x			x	x	x			x
g. Take and make notes	x	x	x	x	x	x	x		x
h. Summaries from oral presentations	x	x	x	x	x	x	x		x
i. Multi-step oral instructions	x	x	x	x	x	x	x		x
3. INTERPRET IMPLIED MEANINGS									
3.1 COMPREHEND IMPLIED MEANINGS									
a. Relate new information	x	x	x	x	x	x	x		x
b. Synthesize information	x	x	x	x	x	x	x		x
c. Literal and implied meanings	x			x	x	x			x
d. Cause and effect	x	x	x	x		x	x		x
e. Defend conclusions	x	x	x	x	x	x	x		x
f. Inferences and conclusions	x	x	x	x	x	x	x		x
g. Interpret subtleties of emotional and intellectual states	x			x		x			x
h. Double meanings	x			x		x			x
4. EVALUATE CONTENT									
4.1 DETERMINE SIGNIFICANCE									
a. Logical and illogical	x	x	x	x	x	x	x		x
b. Propaganda	x								x
c. Biases and stereotypes	x								x
4.2 ORAL COMMUNICATION									
a. Logical answers	x	x	x	x	x	x	x		x
b. Verify information	x	x	x	x	x	x	x		x
c. Express own feelings, knowledge and beliefs	x					x			x
d. Argue opposite sides	x					x			x
e. Sources of persuasion	x					x			x
f. Verbal persuasion techniques	x					x			x

End of Eleventh Grade Skill	Commun & Tech	Word Proc I & II	Business Mach/Math	Office Procedures	Vocational Shorthand	Bus Info Proc I & II	Bookkpg/Recordkpg		FBLA Integration
4.3 DISTINGUISH AND INTERPRET									
a. Sounds of nature									
b. Interpretation of sounds	x								
4.4 EVALUATE PRESENTATIONS									
a. Evaluate mass media	x								x
b. Listen, read, view	x	x	x	x	x	x	x		x
c. Propaganda techniques									x
d. Defenses against propaganda									
5. GENERATE IDEAS									
5.1 VARIETY OF TECHNIQUES									
a. Sources writing/ speaking	x			x		x	x		x
b. Idea-generation techniques	x			x		x	x		x
c. Record ideas for later use	x	x	x	x	x	x	x		x
d. Sources of topics	x					x			x
e. Discuss and share	x	x	x	x	x	x	x		x

End of Eleventh Grade Skill	Commun & Tech	Word Proc I & II	Business Mach/Math	Office Procedures	Vocational Shorthand	Bus Info Proc I & II	Bookkpg/Recordkpg		FBLA Integration
5.2 ORGANIZE IDEAS									
a. Classify	x	x		x	x	x			x
b. Support ideas/concepts	x			x		x			x
c. Select/use details	x			x		x			x
d. Organize information	x	x	x	x	x	x	x		x
e. Oral presentation	x			x		x			x
5.3 SELECT APPROPRIATE FORM									
a. Write in a variety of forms	x			x		x			x
b. Appropriate	x	x		x		x	x		x
5.4 PRESENT IDEAS									
a. Complete sentences	x	x	x	x	x	x	x		x
b. Write essays	x	x	x	x	x	x	x		x
c. Main idea and a closing sentence	x	x	x	x	x	x	x		x
d. Multiparagraph essays	x	x		x	x	x			x
e. Narrative, descriptive, expository and persuasive modes	x					x			x
5.5 ORAL PRESENTATIONS									
a. Convey information	x					x			x

End of Eleventh Grade Skill	Commun & Tech	Word Proc I & II	Business Mach/Math	Office Procedures	Vocational Shorthand	Bus Info Proc I & II	Bookkpg/Recordkpg		FBLA Integration
b. Gestures and inflections	x					x			x
c. Design communication	x					x			x
d. Oral and visual presentations	x			x		x			x
e. Evaluate effects	x	x		x	x	x			x
5.6 EVALUATE AND REVISE									
a. Revise own writing	x	x	x	x	x	x	x		x
b. Sentence structures	x	x	x	x	x	x	x		x
c. Meaning, clarity and precision	x	x	x	x	x	x	x		x
d. Distinguish subtleties	x			x	x	x	x		x
e. Transitional words	x			x	x	x	x		x
5.7 APPLY CONVENTIONS									
a. Edit	x	x	x	x	x	x	x		x
6. REASONING SKILLS									
6.1 RECOGNIZE RELATIONSHIPS									
a. Classification system	x	x	x	x	x	x	x		x
b. Analogies, models, metaphors	x					x			x

End of Eleventh Grade Skill	Commun & Tech	Word Proc I & II	Business Mach/Math	Office Procedures	Vocational Shorthand	Bus Info Proc I & II	Bookkpg/Recordkpg		FBLA Integration
c. Interactions	x			x		x	x		x
6.2 GENERATE INTERPRETATIONS									
a. Explanation and interpretation	x	x	x	x	x	x	x		x
b. Hypothesis	x		x	x		x	x		x
c. Test hypotheses	x		x	x		x	x		x
6.3 IDENTIFY PROBLEMS									
a. Clarify problems						x	x		x
b. Define a problem	x		x	x		x	x		x
c. Solving identified problem	x		x	x		x	x		x
d. Solving variety of problems	x	x	x	x		x	x		x
e. Evaluate problem-solving strategies	x	x	x	x		x	x		x
f. Cooperative problem solving						x			x
g. Analyze data	x	x	x	x		x	x		x
h. "Real-world" problems			x			x	x		x
6.4 REASONED EVALUATIONS									
a. Fallacies	x			x		x			x
b. Appropriate communication	x	x		x		x			x

End of Eleventh Grade Skill	Commun & Tech	Word Proc I & II	Business Mach/Math	Office Procedures	Vocational Shorthand	Bus Info Proc I & II	Bookkpg/Recordkpg		FBLA Integration
c. Evaluate arguments/ positions	x			x		x			x
d. Assess the worth of action	x			x		x			x
e. Assess the quality	x	x	x	x	x	x	x		x
6.5 FORMULATE A POSITION									
a. Analyze authoritative data	x					x			x
b. Defend a position	x					x			x
c. Analyze arguments	x					x			x
6.6 OWN REASONING									
a. Deductive or inductive reasoning	x			x		x			x
b. Evaluate bias	x			x		x			x
c. Defend position	x			x		x			x
7. MANAGE PERSONAL HABITS									
7.1 CLARIFY PURPOSES									
a. Purpose of assignment	x	x	x	x	x	x	x		x
b. Determine ideas in assignment	x	x	x	x	x	x	x		x

End of Eleventh Grade Skill	Commun & Tech	Word Proc I & II	Business Mach/Math	Office Procedures	Vocational Shorthand	Bus Info Proc I & II	Bookkpg/Recordkpg		FBLA Integration
7.2 USE RESOURCES									
a. Media materials	x	x	x	x	x	x	x		x
b. Reference materials	x	x	x	x	x	x	x		x
c. Library services	x	x	x	x		x	x		x
7.3 STUDY TECHNIQUES									
a. Study plan	x	x	x	x	x	x	x		x
b. Study techniques	x	x	x	x	x	x	x		x
c. Reading rate	x			x		x			x
d. Study materials	x	x	x	x	x	x	x		x
e. Assignments on time	x	x	x	x	x	x	x		x
f. Test-taking techniques	x	x	x	x	x	x	x		x
7.4 POSITIVE HEALTH BEHAVIORS									
a. Personal dietary plan									x
b. Substance use enhance physical and mental performance									x
c. Effects of stress									x
d. Personal fitness									x

OREGON DEPARTMENT OF EDUCATION
Division of Vocational Technical Education
700 Pringle Parkway SE
Salem, Oregon 97310-0290

COMPETENCY PROFILE/OFFICE SYSTEMS
Education and Work History

Student Name _____
Address _____
_____
Telephone _____
Social Security Number _____

Enrollment Date _____ Total Hrs Absent _____

Withdrawal Date _____ Total Instructional Hrs _____

Completion Date _____ Total On-the-Job Training Hrs _____

Instructional Program: Office Systems
School Name _____
Address _____
Telephone _____

Course(s) Taken	Instructor

On-the-Job Training/Work Experience

Name of Employer _____ Job Title _____

Address _____
(Street) (City) (State) (Zip)

Supervisor _____ Telephone _____ Duration _____ _____
(From Month/Year) (To Month/Year)

Job Description _____

_____

_____

Name of Employer _____ Job Title _____

Address _____
(Street) (City) (State) (Zip)

Supervisor _____ Telephone _____ Duration _____ _____
(From Month/Year) (To Month/Year)

Job Description _____

_____

_____

Name of Employer _____ Job Title _____

Address _____
(Street) (City) (State) (Zip)

Supervisor _____ Telephone _____ Duration _____ _____
(From Month/Year) (To Month/Year)

Job Description _____

_____

_____

Competency Profile/Office Systems

Directions: Evaluate the student by checking the appropriate number or letter to indicate the degree of competency. The rating for each task should reflect **employability readiness** rather than the grades given in class.

Rating Scale: 3 **Mastered** — can work independently with no supervision
2 **Requires supervision** — can perform job completely with limited supervision
1 **Not mastered** — requires instruction and close supervision
N **No exposure** — no experience or knowledge in this area

3	2	1	N

A. Basic Skills

1. Basic reading skills
2. Basic arithmetic skills
3. Communication
   a. Written
   b. Verbal/nonverbal
   c. Listening
4. Problem solving
   a. Analyze problem
   b. Identify alternatives
   c. Plan of action
5. Operate keyboard by touch (computer/typewriter); use correct techniques
   a. Alpha/numeric keys
   b. Function keys
6. Identify office occupations/careers

3	2	1	N

B. Technical Skills

Perform Keyboarding Services

1. Demonstrate skill in basic document formatting (letter, table, manuscript)
2. Input from draft copy and apply proofreading techniques
3. Enhance the professional appearance of business documents
4. Apply correct punctuation, capitalization, grammar, and spelling rules
5. Prioritize tasks and apply workflow techniques
6. Apply computer formatting, editing, and advanced proofreading techniques
7. Apply computer skills to business information processing software (i.e., spreadsheet, database, graphics, and desktop publishing)
8. Perform speed and accuracy standards
9. Meet production standard for mailable/correctable documents

Perform Business Calculations

1. Operate electronic calculator by touch, using proper key entry techniques
2. Apply business math skills
   a. Convert fractions, decimals, and percents to equivalent forms
   b. Discount, interest, estimation, depreciation, pro rata, mark up and mark down
3. Apply computational skills to recordkeeping/bookkeeping tasks

3	2	1	N

Use Communication Skills

1. Apply oral presentation skills
2. Apply listening skills
3. Apply written skills
   a. Grammar, punctuation, capitalization, and spelling
   b. Composition
   c. Types of correspondence
4. Apply verbal and nonverbal professional image skills
5. Perform proper introduction/business manner skills
6. Apply notetaking skills

Use Office Procedures and Organizational Skills at the Workstation

1. Operate telephone systems — incoming/outgoing
2. Demonstrate telephone techniques — rules of courtesy
3. Perform electronic communications processes
4. Demonstrate machine transcription skills
5. Perform records management skills (alpha, numeric, and subject)
6. Perform mail responsibilities
7. Perform reprographic skills
8. Demonstrate recordkeeping/bookkeeping skills
9. Demonstrate skills in utilizing reference materials
10. Organize, prioritize, and manage work assignments
11. Demonstrate workflow processes
12. Demonstrate human relations skills in the business environment
13. Perform problem-solving, decision-making, and critical-thinking skills

Use Vocational Shorthand Skills

1. Perform dictation skill
2. Perform transcription skill
3. Perform speed and accuracy standard for vocational shorthand

Work in a Simulated Environment

1. Identify workflow, processes, and procedures on a local area network
2. Identify workflow, processes, and procedures in an information processing computerized office

3	2	1	N

3. Identify workflow, processes, and procedures in a traditional (limited computer use) office
4. Perform office support duties to include appointments, meetings, conferences, travel, and teleconferencing in traditional or automated office settings
5. Analyze work efficiency and office system for greatest productivity
6. Apply safety rules and procedures

Leadership Skills (FBLA Competencies)

1. Demonstrate competent assertive business leadership
2. Demonstrate an understanding of American business enterprise
3. Develop individual projects that contribute to the improvement of the community
4. Develop character, prepare for useful citizenship, and foster patriotism
5. Practice and demonstrate efficient money management through FBLA activities

3	2	1	N

C. Fundamental Employment Skills and Attributes

Work Maturity/Attitudes

1. Dependability/appropriate conduct
   a. Attendance
   b. Promptness
   c. Follow through
2. Flexibility/adaptability
   a. Open mindedness
   b. Ability to change
3. Motivation
   a. Willing to learn
   b. Initiative
4. Productivity
   a. Organize tasks
   b. Time management
   c. Efficient
   d. Accuracy
      (1) Ability to file forms
      (2) Complete forms
      (3) Produce counts
      (4) Legible handwriting
5. Loyalty
6. Confidence
   a. Job texting techniques
   b. Selling your skills
   c. Forthrightness
7. Sensitivity
   a. Coworker
   b. Customers/clients/guests
   c. Positive contribution to morale
8. Accepts constructive criticism in evaluation/ professional growth
9. Accepts responsibility
10. Takes pride in work
11. Honesty
12. Grooming and appearance

3	2	1	N

Job Acquisition Skills

1. Locate job market information
   a. Placement office
   b. Acquaintances/friends
   c. Governmental employment office
   d. Private recruiting firms/agencies
   e. Publications
   f. Prospecting
   g. Research potential employer
2. Knowledge of company/job
3. Portfolio
   a. Resume
   b. Cover letter for portfolio content
   c. Letters of recommendation
   d. Compentency profile (examples of work, CWE, titles, degrees, and awards)
4. Letter of application/individualized cover letter/telephone inquiry
5. Appropriate attire
6. Application
7. Interview
   a. Meaningful questions
   b. Honesty
   c. Good eye contact
   d. Personal inventory testing
      (1) Competencies
      (2) Personality test
   e. Follow-up letter/phone call/visit
8. Locate job market information
   a. Placement office
   b. Acquaintances/friends
   c. Governmental employment office
   d. Private recruiting firms/agencies
   e. Publications
   f. Prospecting

Human Relations Skills

1. Understand and act with empathy toward others
   a. Ability to get along
   b. Ability to compromise
2. Dealing with conflict and stress
3. Team attitude (importance of acceptance
   a. Into group
   b. With group decisions
4. Participate/contribute effectively in groups
   a. Understand group dynamics
   b. Adapt personal skills to fit group needs
   c. Present ideas
   d. Handle success and rejection

Certificate of Competency

This is to certify that

_____

has achieved performance levels acknowledged by the competency profile for the Office Systems Program

_____

(SCHOOL)

_____

(DATE)

_____ _____

Instructor *Administrator*